

FM-6 (Contract)

Council District(s) All

Office of Budget and Finance

Comprehensive Facilities Assessment and Multi-Year Improvement Plan for BCPS

The Administration is requesting approval of a contract with Cannon Washington, Inc. to conduct a comprehensive facilities assessment and develop a multi-year improvement plan for all Baltimore County Public Schools. The contract commences upon Council approval, continues through October 31, 2021, and may be extended an additional 120 days. Compensation may not exceed \$1,200,000. See Exhibits A and B.

Fiscal Summary

Funding Source	Maximum Compensation	Notes
County ⁽¹⁾	\$ 1,200,000	⁽¹⁾ Capital Projects Fund. ⁽²⁾ Maximum compensation through project completion.
State	--	
Federal	--	
Other	--	
Total	\$ 1,200,000 ⁽²⁾	

Analysis

The contractor will provide all time, labor, materials, incidentals and sub-contracting necessary to conduct a comprehensive facilities assessment and develop a multi-year improvement plan for all Baltimore County Public Schools (BCPS) in order to prioritize the system's future capital improvement projects. The assessment will focus on five key areas as follows:

- Enrollment Projections, Capacity, and Utilization Assessment;
- Facility Condition Assessment;
- Educational Equity and Adequacy Assessment;

- Community Input; and
- Facility Master Plan.

The Office advised that the high school recommendations will be provided by September 1, 2020, and recommendations for all schools will be provided by May 1, 2021. The final report, including the Facility Master Plan, will be issued by August 31, 2021. The Facility Master Plan will prioritize outcomes for a 5-10 year planning horizon, documenting capital projects for each BCPS school for purposes of the County's Capital Improvement budgeting process. The Office advised that it plans to use the final report in the development of the County's FY 2023 Capital Budget and Capital Improvement Program; however, it may take multiple budget processes to fully fund the recommendations.

The contract commences upon Council approval, continues through October 31, 2021, and may be extended an additional 120 days on the same terms and conditions. Total compensation may not exceed \$1,200,000, including \$120,000 in contingency funding for optional services that may be required by BCPS and/or Baltimore County Government throughout the project. The County may terminate the agreement by providing 30 days prior written notice.

The Office advised that the County awarded the contract through a competitive negotiations process after the County's Request for Proposals yielded three proposals. Specifically, the Office advised that the County selected the contractor based on technical proposal, oral presentation, and interview; following that initial screening process, the County negotiated a price that the Office advised qualified the contractor as the "best value" option of the three proposals. The negotiated contract terms differ substantially from the scope of work originally proposed by the contractor; however, the Office advised that the scope of the advertised procurement was not scaled back and that all components of the advertised scope will be delivered.

County Charter, Section 715, requires that "any contract must be approved by the County Council before it is executed if the contract is...for services for a term in excess of two years or involving the expenditure of more than \$25,000 per year...."

County Charter, Section 902(f), requires that when competitive "...bidding is not appropriate, a contract shall be awarded only by competitive negotiations, unless such negotiations are not feasible...."



COUNCIL ACTION REQUEST FORM EXECUTIVE SUMMARY

The Contractor shall provide all time, labor, materials, incidentals and sub-contracting necessary to conduct a comprehensive facilities assessment and multi-year improvement plan for all Baltimore County Public Schools (BCPS), in order to gather information needed to achieve the BCPS vision, goals, and objectives.

The assessment will be conducted and focus on five (5) key areas to include:

- Enrollment Projections, Capacity and Utilization Assessment
- Facility Condition Assessment
- Educational Equity and Adequacy Assessment
- Community Input
- Facility Master Plan

The Contractor shall mobilize upon approval by the Baltimore County Council, (tentatively March 17, 2020). The High School recommendations, compiled by assessment data and community input, shall be provided by September 1, 2020. Thereafter, recommendations for all schools, compiled by assessment data and community input, shall be provided by May 1, 2021, leading to review and final report issued by August 31, 2021.

The Contractor shall provide assessment reports and the final Multi-Year Improvement Plan in draft format for review and comment by BCPS and Baltimore County, Maryland before production of a final report.

A budget of One Million Two Hundred Thousand Dollars (\$1,200,000.00) has been established for the assessment, multi-year plan and final report, which includes One Hundred Twenty Thousand Dollars (\$120,000.00) in contingencies for optional services that may be required by BCPS and/or Baltimore County, Maryland throughout the project.

Prepared by: Office of Budget and Finance

ATTACHMENT A**SERVICES AND/OR SCOPE OF WORK TO BE PERFORMED**

The Contractor shall provide time, labor, materials, incidentals and sub-contracting necessary to conduct a comprehensive facilities assessment and multi-year improvement plan for all Baltimore County Public Schools (BCPS), in order to gather information needed to achieve the BCPS vision, goals, and objectives, within the following specifications:

1. The Contractor shall attend and present status updates to two (2) meetings each with the Executive Oversight Committee and Technical Oversight Committee. The first to review, confirm goals and obtain a mutual understanding of the overarching planning process and the second to present assessment findings and/or final report. The Contractor shall provide 1-2 in-person attendees at each meeting.
2. Enrollment Projections, Capacity and Utilization Assessment.
 - 2.1 The Contractor shall facilitate two (2) half-day workshops with the Enrollment/ Capacity Utilization Working Group, the first to review methodologies and assumptions and the second to present findings after the assessments are complete.
 - 2.2 BCPS shall provide the Contractor with the prevailing State Rated Capacity (SRC) counts for each campus, which will be used for capacity utilization analysis and capital planning. The Contractor understands that existing floor plan documentation of the schools varies. In order to provide the most usable and effective information to inform the planning, instead of developing a graphical inventory of instructional spaces for capacity analysis, the Contractor shall compile BCPS generated spreadsheets into a tabular database of instructional spaces as a component of the Educational Equity Assessment that can be used by BCPS to apply to current or future logic/formulas for SRC updates.
3. Facility Condition Assessment.
 - 3.1 The Contractor shall facilitate two (2) half-day workshops with the Facility Condition Working Group. The first to review standards and methodologies and the second to present findings after the assessments are complete.
 - 3.2 The Contractor shall perform an industry-standard facility condition assessment, using a system's summary format as a Unifomat Level 3 with a minimum of thirteen (13) discipline records. This approach is based on the workhours required to evaluate and report the condition, life cycle, priority and cost of building systems at the requested level of detail.
4. Educational Equity and Adequacy Assessment.
 - 4.1 The Contractor shall facilitate two (2) half-day workshops with the Educational Equity Working Group. The first, to define equity objectives and gain feedback on a draft assessment methodology and criteria weighting, and the second to present findings after the assessments are complete.
 - 4.2 The Contractor shall facilitate an educational equity and adequacy assessment that blends the Maryland Educational Facilities Sufficiency Standards with some appropriate District specific elements. This collaboration will become the rubric by which the Contractor will score the 175 educational facilities.
 - 4.3 The Contractor shall provide a data structure and procedures for BCPS and/or County staff to perform "desktop data compilation" to acquire, compile and upload electronic documentation of

1) composite floor plans/ fire escape diagrams, 2) school teacher rosters with room numbers, 3) public domain aerial images, 4) brief school phone interview and 5) instructional space list/spreadsheets. The Contractor shall compile this BCPS provided data into a singular database and evaluate and report the criteria associated and prepare the rankings for integration with the FCA Scoring to produce a combined ranking for each facility.

5. Community Input.

- 5.1 The Contractor shall facilitate two (2) half-day workshops with the Community Engagement Working Group. The first, to define goals, gain feedback on the draft community engagement and communications plan and gain input on a community survey. The Second, to present findings.
- 5.2 The Contractor shall develop and deploy an online community survey, concurrent with the assessments aimed to 1) elicit stakeholder feedback on educational goals and decision-making criteria that will be used to inform multi-year planning and CIP recommendations, and 2) gain objective measures of community perception of facility condition and equity yielding an informative "perception vs. reality" comparison with assessment findings. Survey respondents will be asked to identify region/ school affinity for cross-tabulation of survey results. A report of survey findings shall be provided to BCPS. Personnel and resources from BCPS and Baltimore County, Maryland will conduct mid and late course monitoring to inform school-led outreach to ensure representative sampling of all BCPS communities.
- 5.3 The Contractor shall design and attend a three-step series of evening workshops, led and facilitated by BCPS and Baltimore County staff, with each of the five (5) Area Educational Advisory Councils to 1) orient members on guiding principles and data, 2) vet and prioritize operational scenarios and facility options, and 3) report back the results of the multi-year improvement plan and conduct an anonymous engagement process quality poll.
- 5.4 As an option, the Contractor may be called upon to facilitate five (5) open-invitation Area Community Meetings to elicit feedback on operational scenarios and facility options from all interested stakeholders prior to finalization of the multi-year improvement plan. These meetings would feature small-group discussion and lie polling moderated by members of the corresponding Area Education Advisory Councils.

6. Facility Master Plan.

- 6.1 The Contractor shall provide Facility Master Planning services that result in stakeholder-vetted and objectively prioritized outcomes for a 5-10 year planning horizon, documenting capital projects for each BCPS school, suitable to inform the County's CIP budgeting processes as follows:
 - 6.1.1 The Contractor shall assist BCPS and Baltimore County with assembling a composite Multi-Year Planning Committee, comprised of key members from each of the four (4) Working Groups and five (5) Area Educational Advisory Councils to represent the interests of all BCPS students and communities as a system and collaboratively, develop the facility master plan recommendations with the Contractor's facilitation and consensus-building. This framework provides BCPS and County leadership with a resulting plan that has been developed and endorsed by a well-informed, diverse group of representative stakeholders, which improves the prospects of public support.
 - 6.1.2 The Contractor shall facilitate a 4-step series of half to full day workshops with the Multi-Year Planning Committee to 1) define guiding principles for the multi-year improvement plan and review all assessment data and community survey results regarding decision

making criteria and perceptions, 2) finalize prioritization criteria and develop interim high school recommendations to inform time-critical CIP decisions, 3) develop operational/ capital scenarios and facility options for all campuses, and 4) review AEAC and Community feedback on scenarios/ options to determine final recommendations.

7. Reports.

- 7.1 The Contractor shall prepare summary activity progress reports on a monthly basis, aligned with the invoicing cycle.
- 7.2 The Contractor shall provide assessment reports and the final Multi-Year Improvement Plan in draft format for review and comment by BCPS and Baltimore County, Maryland within a reasonable timeframe (in a single batch) before production of a final report.
- 7.3 Reports shall be presented to BCPS and Baltimore County, Maryland in electronic format, with any hard copy production as a separate reimbursable expense.

8. Deliverables.

- 8.1 The Contractor shall utilize a web-based software system to collect, analyze and report the data developed during the assessment portions of the project. The Contractor shall transmit FCA findings in the FOScore software and export all reports in PDF format.
- 8.2 The data entered into the software system always belongs to BCPS and Baltimore County, Maryland, and may be exported using Microsoft Excel. The web-based solution has unlimited users and includes all updates (annual cost applies).

9. Schedule.

- 9.1 The Contractor shall mobilize upon approval by the Baltimore County Council, (tentatively March 16, 2020).
- 9.2 The Contractor shall provide High School recommendations, informed by assessment data and community input by September 1, 2020.
- 9.3 The Contractor shall provide recommendations for all schools, informed by assessment data and community input by May 1, 2021, leading to review and final report issued in August 2021.
- 9.4 The Contractor's Delivery Schedule is included with this attachment.

10. Project Team Organization.

- 10.1 The project team assigned to the BCPS Multi-Year Improvement Plan for all Schools shall include:

10.1.1 Leadership Team.

Project Principal: Michael Glaros, Cannon Washington, Incorporated
Project Management: Catherine Tinkler, Cannon Washington, Incorporated
Strategic Planning: Stuart Brodsky, Cannon Washington, Incorporated
Strategic Planning: Dr. David Lever, Educational Facilities Planning, LLC

10.1.2 Educational Assessment.

Paul Mills, Cannon Washington, Incorporated
Rebecca Rogers, Cannon Washington, Incorporated
Ryan Pfarr, Cannon Washington, Incorporated
Briana Blowe, Cannon Washington, Incorporated
Daniel Beatty, Cannon Washington, Incorporated
Briana Jones, Cannon Washington, Incorporated
Jake Miller, Cannon Washington, Incorporated

10.1.3 Facility Assessment.

Daniel Green, Cannon Washington, Incorporated
Randy Heim, Cannon Washington, Incorporated
Mario Alcantara, Cannon Washington, Incorporated
Roderick Henderson, Cannon Washington, Incorporated
Sonyora Points, Cannon Washington, Incorporated
Justin Ward, Cannon Washington, Incorporated
Rudy Runnings, Cannon Washington, Incorporated
Del Ambrosia, Cannon Washington, Incorporated
Nicolas Derr, Cannon Washington, Incorporated
Michael Carroll, Cannon Washington, Incorporated
Dave Malinowski, Cannon Washington, Incorporated
Brad Halvorson, Cannon Washington, Incorporated
Benjamin Kozar, Cannon Washington, Incorporated
Mark Tittle, Cannon Washington, Incorporated
Elizabeth Bulger, JRS Architects, Inc.
Vincenza Perla, JRS Architects, Inc.
Hannah Veater, JRS Architects, Inc.
Ana Castro, JRS Architects, Inc.

- 10.2 The Contractor shall notify BCPS and Baltimore County, Maryland of any proposed changes to the project team during the term of this Agreement. Approval of changes to the project team shall be at the sole discretion of BCPS and Baltimore County, Maryland.